

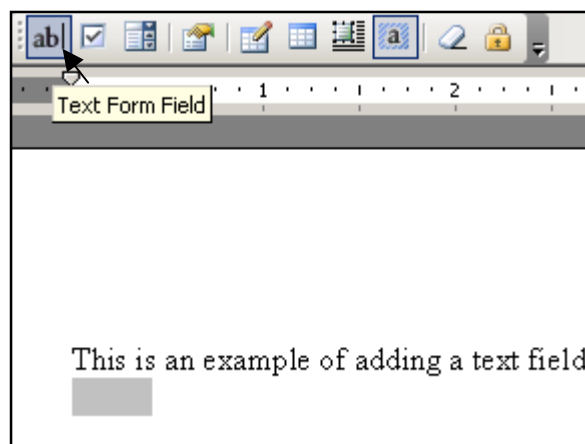
Report Writing: Consistent, Clear Communication of AT Needs
Closing the Gap 2007
John Laskarzewski and Lauri Susi

Creating an AT Report Template in Microsoft Word

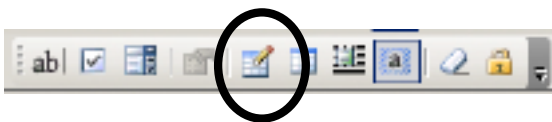
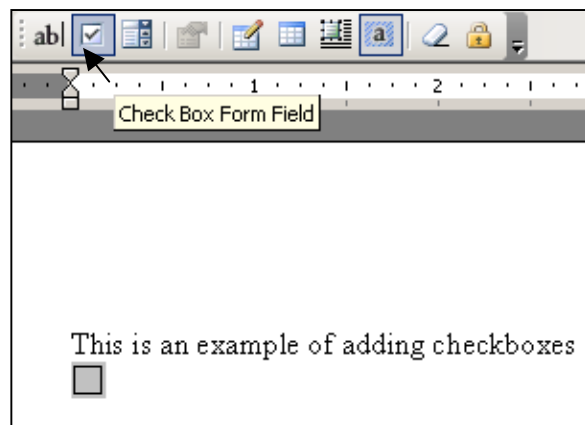
Step 1: Using the Forms Toolbar

1. Start a new document and show the Forms toolbar by selecting View, Toolbars, Forms. The toolbar appears under the Standard toolbar at the top of the document window.
2. Use the standard MS Word writing features to create Headers, Footers, and explanatory text.
NOTE: When locked this area will not be able to be edited.

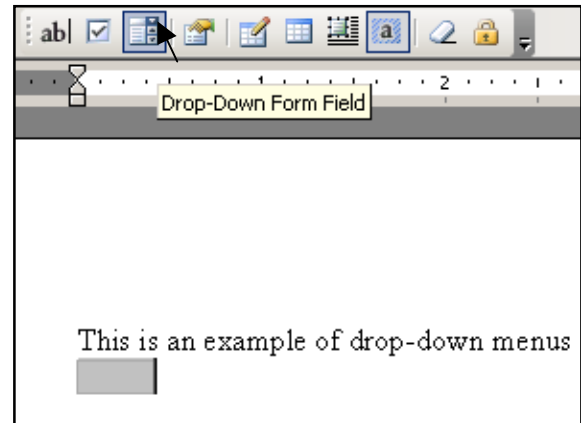
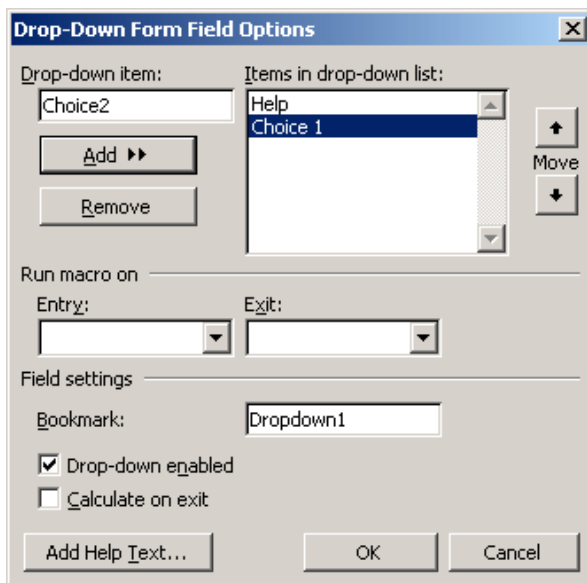
3. Add text fields to areas of the report in which you want users to be able to enter information. To add text field; begin by placing the cursor at the location in which you want users to be able to enter text. Then click on the Text Form Field icon on the Forms toolbar. When the document is locked users can click into the field to add text. The field will expand as text is entered.



4. To add checkboxes to a document; begin by placing the cursor at the location in which you want the checkbox to appear. Then click on the checkbox icon on the Forms toolbar.
5. Create table to allow users to enter data. Click on the Tables button on the Forms Toolbar. This feature works the same as the Insert Table button on the standard toolbar.



6. To add drop-down menus that allow a multiple choice feature; begin by placing the cursor at the location in which you want the drop-down menu to appear. Then click on the drop-down icon on the Forms toolbar.
7. Double-clicking in the grey box reveals the



Form Field Options dialog Window.

Type in the words you want to appear in the drop-down item field (see Choice 2 at left) and click the Add button to enter it into the list. Click OK. NOTE: The document must be locked for the drop-down menu feature to work.



8. To lock the document, click on the lock

icon on the Forms toolbar. You must unlock the document to delete any of the features you created.

Step 2: SAVE as a Template

1. Select Save As from the File Menu.
2. In the Save as type field, click the down triangle and select Document template as shown to the right. Notice that the Save As window automatically navigates to the templates folder in MS Word.
3. To save your template in another location, click on the down triangle that appears in the Save in window at the top and select the location you want to save your Report Template.
4. Click on Save

